The AI-for-finance starter pack

The checks, the setup and the prompts I use before I trust an AI answer.

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Five checks before you trust an AI number

1. **Recompute the total yourself.** In code or in Excel. Never accept a total that only appears in the AI's prose.
2. **Count the rows and check the period.** Does the row count match the source? Do the first and last dates match?
3. **Make it state its definitions.** What counts as revenue, which rows were left out, which orders carry discounts. If a definition is missing, it should ask, not choose.
4. **Ask how the answer could be wrong.** Then test that one thing.
5. **Keep a record.** The input, the rule and the result, so someone else can re-run it and get the same answer.

Why these. Totals can look right while errors cancel out. A sign flip and a duplicate can nearly offset, while an account error and a period error never move the total at all. Row counts and by-period totals catch what a single total hides.

Set it up once: standing instructions

Put this in your AI tool's custom instructions or memory, filled in. Keep it under 300 words. Review it after a week of use.

```
About me
- Role: [your title and function], at a [size and type of] company in [industry].
- Tools I work in: [Excel, Power BI, an ERP, a data warehouse].
- Who reads my work: [audience], who already know [what they know] and do not need [what to skip].

How I want answers
- Lead with the answer, then the support. Short by default, longer when I ask.
- Show the arithmetic. Never state a number you did not compute from data I gave you.
- Name your assumptions before the answer, and say which ones would change it.
- If data is missing, say what is missing. Do not guess.
- If a request is ambiguous and the answer would change the result, ask one question first.
- Use my terms: [term] means [definition]. [term] means [definition].

Rules for checking
- After any calculation, give me a check I can run by hand.
- Propose changes first. Do not change any file or system until I say so.
- Say what you could not verify.

What not to do
- No filler, hype or motivational language.
- Do not invent figures, sources, names or policies.
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Start every task with a context brief

Paste this at the start of a task. It takes two minutes and removes most of the back and forth.

```
Context for this task
Goal: [the decision this work supports]
Audience: [who reads it, and what they already know]
Data: [files or systems, the period covered, what each column means]
Definitions: [how we define the key terms for this task]
Constraints: [deadline, format, anything you must not touch]
What I already expect: [last period's figure, or the result I think is right]
What done looks like: [the format, and the checks I will run]

Before you start, tell me what you still need and what you will assume.
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Four prompts to copy

1. Interview me to write my standing instructions

```
Interview me to write my standing instructions for you. Ask one question at a time, up to ten.
Cover: my role, my audience, the tools and systems I use, how I define the key terms I work with, how
I like answers formatted, what I check before I trust a number, and what I never want you to do.
Do not ask for confidential data, the names of colleagues or customers, or any credentials.
When you are done, write the instructions as short bullet points, under 300 words. Then list three
things I should check about them after a week of use.
```

2. Make it show its checks

```
Here is [the dataset or file description].
Question: [your question].
Before you answer, do three things and show each result:
1. State every definition you are assuming (what counts as revenue, which rows you excluded, the
period start and end).
2. Compute the total in code, not in your head, and give the row count it covers.
3. Tell me one way this total could be wrong, and how I would test for it.
Then give the answer. If a definition is missing, ask me instead of choosing one.
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3. Test a connection with a question you already know

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You are connected read-only to [the model or data source]. Do not change anything.
Test: answer this question, which I already know the answer to: [a question with a known answer, such
as last month's total for one region].
Show the exact query or measure you used, the result, and any filters that were applied.
If your result differs from [the known value], list the three most likely reasons before you try
anything else.
```

4. Set the limits before it does any work

```
You may do this task: [the defined task].
You may not: change source data, send anything to anyone, or act on any item above [dollar threshold].
For every item you handle, record: the input, what you did, the rule you applied and your confidence
(high, medium or low).
Put anything you are unsure about in a separate list for a person to decide. Do not resolve it
yourself.
End with a one-paragraph summary a reviewer can check against the log.
```